

## How to complete the administrative forms (Forms A0 to A5 and B1 to B5).

As specified in the guide for proposals, the proposal forms can be prepared using the Proposal Preparation Tool (ProTool), which can be downloaded free-of-charge from:

<http://www.cordis.lu/improving>.

### When using ProTool

If only possible ProTool should be used to fill in the forms. Proposals forms prepared with ProTool may be printed out and submitted on paper, or submitted electronically. If possible, it is strongly advised to submit the forms electronically. ProTool provides on-line help facilities and instructions for entering and submitting the required information electronically.

### When not using ProTool

When ProTool cannot be accessed, only paper submission is possible. In such cases, you should detach and complete the forms or you may use photocopies of them provided the quality is good. Alternatively, you can download the forms from the above Internet address. When you have completed the forms, please keep a photocopy for your own file.

Please note that the forms may be machine-read at the Commission, so to minimise the possibilities of your proposal details being read incorrectly, you should read the explanatory notes below carefully and follow the following instructions:

- If possible, please fill in the forms by typewriter. A photocopy of the original may be used if the quality is good. However, the forms sent to the European Commission must have original signatures.
- Please keep the forms as clean as possible and do not fold, staple or amend them with correction fluid.
- Please enter your data only in the white space on the forms and do not type outside the boundaries (to avoid the data being truncated during the optical reading process). For questions requiring a choice between different boxes, please enter X in the appropriate space. You may find it easier to do this by hand in black ink, rather than try to line up a single typed character.
- When using characters in Danish, German, Finnish, Norwegian or Swedish, please replace the characters listed below by the corresponding double characters:

Ø	OE	æ	ae	Ä	AE	Ü	UE
ø	oe	Å	AA	ä	ae	ü	ue
Æ	AE	å	aa	Ö	OE	ß	ss
						ö	oe

- For numbers (amounts, durations, percentages, person-months), please round to the nearest whole number. Do not insert any character or space to separate the digits in a number. If relevant, costs must be given in euro (and not kilo euro).
- Please remember to indicate the applicant name at the top of each of the pages of the forms.

### 1. Proposal Full Name

Use a clear, self explanatory title of not more than 10 words, providing guidance as to the contents of the project.

### 2. Proposal Acronym

An acronym for the proposal freely chosen by the applicant, to identify the proposal file (for example short proposal title).

### 3. Call Identifier

The call identifier is the reference number given in the call you are addressing, as indicated in the publication of the call in the Official Journal. (See on the Internet Site <http://www.cordis.lu/improving>)

#### 4. Research Programme

Indicate one programme code (number) from the list of programmes offering Marie Curie Host Fellowships given below. For further details, see the section on programmes offering Marie Curie Fellowships in the Guide for Proposers.

- IHP** Human Potential
- QOL** Quality of Life
- IST** Information Society
- GROW** Competitive Growth
- EESD** Energy, Environment and Sustainable Development

#### 5. Type of Fellowship

Please use one of the following codes:

- IND:** Marie Curie Industry Host Fellowship;
- DEV:** Marie Curie Development Host Fellowship;
- PHD:** Marie Curie Training Site.

#### 6. Organisation Legal Name

If applicable, name under which the organisation is registered in the official trade registers. For multipartner Training Sites see section 3.2.1 of the Guide for Proposers.

#### 7. Less-Favoured Region (LFR)

The LFRs of the Community are listed in the annex of the latest version of the Guide for Proposers.

#### 8. Describe the research to be supported

- For Marie Curie **Industry Host** Fellowships describe the proposed research training area.
- For Marie Curie **Development Host** Fellowships describe the research competence sought.
- For Marie Curie **Training Sites** describe the research training to be provided.

#### 9. Evaluation panel code

For applications to the Human Potential Programme only, indicate one evaluation panel code from the list below that best reflects the scientific field of the proposal. For applications to other programmes leave this field blank. Before choosing a panel code, please refer to the list of subdisciplines given in the Guide for Proposers in the Human Potential Programme section.

<b>CHE</b>	Chemistry	<b>ENV</b>	Environmental and Geo-Sciences
<b>ECO</b>	Economic Sciences	<b>LIF</b>	Life Sciences
<b>SOC</b>	Social and Human Sciences	<b>MAT</b>	Mathematics and Information Sciences
<b>ENG</b>	Engineering Sciences	<b>PHY</b>	Physics

#### 10. Sub-disciplines/areas

Enter codes in order of their relevance to the project as given in the Guide for Proposers: for applications to the Human Potential Programme choose sub-disciplines, for applications to other Programmes choose thematic priorities, for example:

- M-01 "Statistics and Probability" (Human Potential Programme)
- QOL-2000-6.1. "Age-related illnesses and health problems" (Quality of Life Programme)

This helps the Commission in the allocation of applications within the evaluation panel.

## 11. Fellows requested

- For Marie Curie **Industry Host** Fellowships fellows may be requested at postgraduate\* and post-doctoral<sup>◇</sup> level.
- For Marie Curie **Development Host** Fellowships only post-doctoral<sup>◇</sup> fellows can be requested.
- For Marie Curie **Training Sites** only postgraduate\* fellows who are doing a doctoral degree can be requested.

\* Postgraduate researchers are holders of a final degree from a university or equivalent institution of higher education, which allows the holder to embark directly on a doctorate or equivalent degree.

◇ Post-doctoral researchers are typically researchers with a doctoral degree or at least 4 years of full-time research experience at post-graduate level other than doctoral studies.

## 12. Number of researcher-months requested

Indicate the requested number of researcher-months by level of qualification. Please consult the guidelines for the number of researcher-months per application in the Guide for Proposers. Full and detailed justification should be provided, if the number of researcher-months requested lies outside the suggested guidelines.

## 13. Indicative number of fellows

Give the number of fellows, who will be hosted by the organisation. This number is indicative.

## 14. Registration No with the European Commission's Research Programmes

In case the organisation has already received a registration number under the fifth Framework Programme, please enter it here, and only give the organisation details if they have changed since the registration number is received. Leave blank if the organisation has not received a registration number from the European Commission. **This registration number will only be issued once the organisation has been validated during the negotiation of a contract with the Commission.**

## 15. Organisation Short Name

If applicable, the short name of the organisation chosen by the participant for this proposal. This should normally not be more than 20 characters.

## 16. Legal Registration No

If applicable, please provide the organisation's legal national registration number or code found in, e.g. the Chambers of Commerce register or the business register.

## 17. Activity Type

Indicate the principal activity of your organisation. Please use one of the following codes:

**REC:** Research (i.e. organisations only or mainly established for research purposes);

**HES:** High Education (i.e. organisations only or mainly established for higher education/training, e.g. universities, colleges);

**IND:** Industry (i.e. industrial organisations private and public, both manufacturing and industrial services – such as industrial software, design, control, repair, maintenance);

**OTH:** Others

## 18. Legal Status

Please use one of the following codes:

**GOV:** Governmental (local, regional or national public or governmental organisations e.g. libraries, hospitals, schools);

**INO:** International Organisation (i.e. an international organisation established by national governments);

**JRC:** Joint Research Centre (i.e. the Joint Research Centre of the European Commission);

**PUC:** Public Commercial Organisation (i.e. commercial organisation established and owned by a public authority);

**PRC:** Private Commercial Organisation including Consultant (i.e. any commercial organisations owned by individuals either directly or by shares);

**EEI:** European Economic Interest Group;

**PNP:** Private Organisation, Non Profit (i.e. any privately owned non profit organisation).

#### 19. Legal Status: 'If 'PRC', Specify'

If you are a Private Commercial Organisation (PRC), please indicate the type of organisation (e.g.: SA, LTD, GmbH, independent person, ...).

#### 20. Business Area (NACE)

For statistical purposes, the Commission services need to classify the principal economic activity of each participant. This is done for the programmes in the 5<sup>th</sup> Framework programme according to the 2-digit or 3-digit NACE Rev. 1 classification, listed in Annex 3. (NACE is "Nomenclature générale des activités économiques dans les Communautés européennes"). You should identify the principal economic activity of your organisation, or, in the case of a larger organisation, of the executive division of your organisation making the proposal.

For example: 80 for Universities (Code for Education)  
73 for Research and Development

#### 21. Annual Turnover

This field is for statistical information only. Information from the most recent accounting year should be used. The figures should be given for the organisation as a whole and not just for the subsidiary company or the department carrying out the work. The following codes for intervals should be used:

**T1:**  $0 \leq$  EUR 7 million (Annual turnover less than or equal to EUR 7 million)

**T2:**  $>$  EUR 7 million or  $\leq$  EUR 40 million (Annual turnover more than EUR 7 million or less than or equal to EUR 40 million)

**T3:**  $>$  EUR 40 million (Annual turnover more than EUR 40 million).

If not applicable (e.g. for universities) leave blank

#### 22. Annual Balance Sheet Total

This field is for statistical information only. The figures should be given for the organisation as a whole and not just for the subsidiary company or the department carrying out the work. Information from the most recent accounting year should be used. The following codes for intervals should be used:

**B1:**  $0 \leq$  EUR 5 million (Annual balance sheet total less than or equal to EUR 5 million)

**B2:**  $>$  EUR 5  $\leq$  EUR 27 million (Annual balance sheet total more than EUR 5 million or less than or equal to EUR 27 million)

**B3:**  $>$  EUR 27 million (Annual balance sheet total more than EUR 27 million).

If not applicable (e.g. for universities) leave blank

#### 23. Number of employees

This field is for statistical information only. All participants should fill it in. The figures should be for the legal organisation as a whole - not only for the department carrying out the work. The contribution of part-time staff should be accounted as the equivalent number of full-time staff – as full-time equivalents. Please indicate the number of full-time equivalent employees according to the following classification:

**S1:** 0 employee

**S2:** 1 – 9 employees

**S3:** 10 – 49 employees

**S4:** 50 – 249 employees

**S5:** 250 – 499 employees

**S6:** 500 – 1999 employees

**S7:** 2000+ employees

#### 24. Independence

An organisation is independent if less than 25% of the capital or the voting rights is owned by one enterprise or jointly by several enterprises falling outside the definition of an SME (except public investment corporations, venture capital companies and institutional investors, provided no control is exercised either individually or jointly).

If the organisation is not independent, you should provide the name(s) of the company(ies) which own(s) 25 % or more of the organisation.

An SME (small and medium-sized enterprise) is defined as an entity that has less than 250 full time equivalent employees, has an annual turnover not exceeding EUR 40 million, or an annual balance sheet total not exceeding EUR 27 million, and is not controlled by 25% or more by a company which is not an SME.

**25. Owners**

Please provide the legal name(s) of the organisation(s) controlling the organisation by 25% or more.

**26. P. O. Box**

If applicable, indicate number of Post Office Box for surface mail delivery.

**27. Post Code**

Enter numerical (alphanumeric for United Kingdom and The Netherlands) post code without being prefixed by the country identifier, e.g. 1000 and not B-1000 or SW1H 9AS and not UK-SW1H 9AS.

**28. Cedex**

If applicable, indicate Cedex for surface mail delivery.

**29. Country Code / Name**

Use the relevant country code and country name as indicated in the list in Annex 2. For any country not included in the list in Annex 2, please indicate the full name of the country in the "Country Name" and leave the "Country Code" blank.

**30. Gender (F(emale) / M(ale))**

This information is required for statistical purposes only. Please indicate with a cross as appropriate.

**31. Telephone No and Fax No**

Please give the telephone and fax numbers in the following format, for example (a European Commission telephone number in Brussels, Belgium): (32-2)2988888 (32 being the country code number; 2 the area code number for international calls; 2988888 the subscriber's number).

**32. Administrative Officer's Signature / Co-ordinator's Signature**

For electronic submission only one of the two signatories (*administrative officer or co-ordinator of the proposal*) can sign. In such cases the signatory must be authorised to sign on behalf of the organisation.

**33. Name of research group**

- For Marie Curie **Industry Host** Fellowships indicate the name of the department(s) or research group(s) where the research training will be carried out. For Small and Medium Sized Enterprises (SME) this does not have to be on the company premises. If this is the case, give the name of the organisation where the research training will be carried out.  
An SME has less than 250 full-time employees, an annual turnover of less than EUR 40 million or an annual balance sheet of less than EUR 27 million and is not owned by 25% or more by a company which is not an SME.  
The full definition of an SME is given in the Guide for Proposers.
- For Marie Curie **Development** Fellowships indicate the name of the research group where the research will be carried out.
- For Marie Curie **Training Sites** indicate the name of the research group or inter-related research groups where the doctoral training will be carried out. Organisers of international doctoral studies involving at least five organisations in three different countries within the framework of a formal agreement should give the name of this agreement.

**34. Number of full-time researchers in research group**

Give the number of full-time (or equivalent full-time) researchers, excluding PhD students, if any. In the case of an SME benefiting from special measures (section 3.2 of the Guide for Proposers), give the number of full-time researchers of the research group (i.e. research partner) where the research training will be carried out.

### 35. Recruitment advertisement

- For Marie Curie **Industry Host** Fellowships this advertisement should specify the area of research training, the work environment, and the qualifications/experience required by the applicants.
- For Marie Curie **Development Host** Fellowships this advertisement should specify which research competence is sought, the host research environment, and the qualifications/experience required by the applicants.
- For Marie Curie **Training Sites** this advertisement should mention details of the research training, which will be provided, the expertise available within the research environment, and the qualifications/experience required by the applicants.